

Interfolio RPT for Case Managers

Quick Start Guide for 2025-2026

September 17, 2025

This document is intended to assist staff (“Case Managers”) who support the promotion and tenure process using Interfolio.

Interfolio RPT

- The Interfolio Review, Promotion, and Tenure module (RPT) is the system required for all promotion, promotion and tenure, and reappointment reviews (P&T review) at Ohio State
- The college will create an Interfolio case for every faculty candidate with an upcoming P&T review
- To view your candidate’s case:
 - Log in to Interfolio: <https://go.osu.edu/interfolio>
 - Enter OSU name.# and password
 - At prompt: “Where to you want to go?” > Select OSU logo, NOT the Interfolio dossier logo
 - Interfolio will automatically take you to the OSU home page after first log in
 - Navigate to the menu bar on the left side of the screen
 - Under “Review, Promotion, and Tenure” select “Cases”
 - Each candidate in your unit should be listed

Case Manager Responsibilities

- Add POD, P&T Chair, TIU Head, and Regional Campus administrators to each Committee in the Case Review Steps
- Upload files to Internal Sections (e.g., annual reviews, fourth year reviews, peer evaluations, external evaluations, summary of student comments, and joint appointment review, as applicable)
- Unlock Candidate Packet sections as needed
- Move the case forward or backward through the Case Review Steps
- Upload or move files to fulfill Case Review Step requirements as needed

Adding Committee Members to the Case

- In order for the POD, P&T Chair, and Regional Campus administrators to have access to a case, you must add them to the Case Review Steps. We recommend adding the TIU Head as well, but this is only required at the TIU Head Review Step
- To add parties to the Case Review Steps, do the following:
 - Click the “Case Options” button (top right of candidate’s case)
 - Select “Edit Case” > Select “Case Review Steps”
 - For each of the TIU steps (POD Reviews, Regional Campus steps, CEF Review, TIU Head Review, Candidate Comments)
 - Click “Edit”
 - Click “Add Members” and enter the names of the POD, P&T Chair, and TIU Head in the search bar > “Close”
 - Click the “star” icon next to the designated Committee Manager (E.g., POD for POD Review steps). Only select one person as the Committee Manager
 - Click “Return to Case Review Steps”
- Do not add committees through the “Users and Groups” page. These committees do not flow automatically to cases and still must be added using the Case Options steps above

Moving the Case Forward/Backward

- To move the case, the requirements for the step must be completed
- Cases can only be moved one step at a time
- Click the “Send Case” button (top right corner) > Select the desired step either moving forward or backward. Enter a subject and edit the message to notify Committee members
- Click “Continue” to send the message and move the case

Uploading and Moving Files to “Case Details”

- Either the Case Manager or Committee Manager can upload files to the “Case Details” page
- Click into the “Case Details” page
- Scroll down to the “Required Items” section
- Click “Add” > default page is “Upload a new file”
 - If the file has not been added to “Internal Sections” > “Browse To Upload” and select the relevant file
 - If the file has been added to “Internal Sections” > click “Select file from case” page > select the relevant file
- Click “Add”



Completing and Editing Forms

- At most steps, the Committee Manager (e.g., POD, TIU Head) will need to complete a form
- This can only be done on the “Case Details” page
- The Committee Manager scrolls down to the “Required Items” section
 - Only the Committee Manager will see the “Fill Out Form” option
- Case Managers can check the status of forms by selecting “Manage Respondents”
- The Committee Manager can edit the form by returning to “Case Details” and scrolling to the “Required Items” section to see the “Edit Submission” option

Candidate Comments

- New steps added this year for Regional Campus and TIU Candidate Comments
- Case Manager may designate yourself or another person as the Committee Manager
- The Committee Manager uploads the candidate’s comments (or statement that they have not comments) at this step
- If there are comments, any response from the Regional Campus, CEF, or TIU Head should also be uploaded to this section
- Candidate Comments will be the last step before submission to the college

